



## SMS DocLink User Manual

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# Welcome

Welcome to SMS DocLink!

SMS DocLink is designed to be an easy to use application that enables mobile phone users to request documents by sending a keyword. The document is then delivered electronically to a specified fax number or email address.

Using SMS DocLink you can:

- Upload documents to the DocLink File store via a web-based user interface
- Define document keywords via a web-based user interface
- Pre-define nicknames for email addresses and fax numbers
- Generate reports and view request documents via a web-based user interface
- Request documents to be delivered via fax or email from your mobile phone

See also:

- Getting Started
- DocLink Files
- Nickname Address Book
- Reports
- Requesting Documents

# Getting Started

To get started, you must be registered to use SMS DocLink. You will receive, via email, notification that you have been registered. The email contains the following information:

- The URL for the SMS DocLink web-based user interface.
- Your username and password for the SMS DocLink web-based user interface
- The service number to which to send SMS Keyword requests

See also:

- Welcome
- DocLink Files
- Nickname Address Book
- Reports
- Requesting Documents

# DocLink Files

In order to view and add your DocLink files, you must login to the SMS DocLink user interface.

1. Open an Internet browser, and navigate to the URL given in your registration notification email. You may wish to bookmark the URL for future use.
2. Having logged in using your username and password, click on **SMS DocLink**

## Add DocLink Files

To add a new DocLink file to SMS DocLink, click on the '**Add DocLink File**' link from the DocLink Files sub menu.

1. Enter a single Keyword and description for your DocLink file. Each Keyword must be unique.

See example below.

The screenshot shows a form titled 'Add Doclink File'. It contains two input fields: 'Keyword:' with a required asterisk (\*) and 'Description:' with a scrollable text area.

2. Associate your SMS DocLink Document to your keyword. It is possible to add two types of DocLink Documents; Files or URL's

### Adding a File to your DocLink application:

Select the 'Browse to File' radio button and click on the 'Browse' button to navigate to the file you wish to upload. You will not be permitted to upload files larger than 1MB. Most Microsoft compatible file formats are supported such as PDF and MS Word.

### Adding a URL to your DocLink application:

Select the Enter URL radio button and enter a URL in the field provided. e.g. <http://www.myWebSite.com>

See example below.

The screenshot shows a section of the form with two radio buttons: 'Browse for File' (selected) and 'Enter URL'. Below each is a file input field and a 'Browse...' button. A red asterisk (\*) is next to the 'Disclaimer' link.

3. Define your Email Format

It is possible to define the layout of the email that will be sent to the recipient of the SMS DocLink file. Define the subject, from email address, header and footer of the email. The header and footer will be displayed in the body of the email. It is also possible to stipulate how your document is sent. You can set your document to be sent in one of two ways; As a URL or as an attachment.

### Send document as a URL:

To send your document as a URL, select the 'Send as URL' radio button. By selecting this option, a link to your document will be displayed between the header and the footer of the email body. This option allows the recipient to download the document from the DocLink server.

**Send document as an attachment:**

To send your document as an attachment, select the 'Send as attachment' radio button.  
Note that a URL document can not be sent as an attachment.

4. To enable your document to be sent via fax, check the 'Enable sending this document via Fax' check box. Note that if you fax enable a URL document, only the URL will be sent to the fax recipient.
5. Click Save to add your document to the SMS DocLink file server and return to the DocLink File list.
6. Click Cancel to return to the DocLink File list without saving your entry.

See example below.

The screenshot shows a 'Define Email Format' dialog box. At the top, there is a radio button group labeled 'Send As:' with 'url' selected and 'Attachment' unselected. Below this are fields for 'Subject' (empty), 'From E-Mail Address' (empty), 'Header' (empty), and 'Footer' (empty). A note '\*\* URL is displayed here \*\*' is centered between the header and footer fields. At the bottom left is a checkbox labeled 'Enable sending this document via Fax'. At the bottom right are 'SAVE' and 'CANCEL' buttons. A note at the bottom states 'Note: Mandatory fields are marked with \*'.

## **Edit DocLink Files**

To edit an existing DocLink file, click on the '**View DocLink File**' link from the DocLink Files sub menu. Click the Edit button adjacent the document you wish to edit. Edit your document settings and save. See Add DocLink Files.

## **Delete DocLink Files**

To delete an existing DocLink file, click on the '**View DocLink File**' link from the DocLink Files sub menu. Click the Delete button adjacent the document you wish to delete.

# Nickname Address Book

The Nickname Address Book allows you to store contacts and associate an alias to them. When requesting a document, include the nickname instead of the full address. To find out more about requesting SMS DocLink documents from your mobile phone, see Requesting Documents.

In order to manage your Nickname Address Book, you must login to the SMS DocLink user interface and click on the Reporting tab.

1. Open an Internet browser, and navigate to the URL given in your registration notification email. You may wish to bookmark the URL for future use.
2. Having logged in using your username and password, click on **SMS DocLink**, and then **Nickname Address Book**

## Add a nickname entry to your address book:

1. Add a single, unique keyword/ nickname in the Nickname field.
2. Check the appropriate radio button to define your address type as either email or fax.
3. Enter a valid address in the address field. Note that fax numbers need to be in international format. e.g. 27211234567
4. Click Add.

## Edit a nickname:

1. Click the Edit button adjacent the Nickname entry you wish to edit.
2. Edit your entry.
3. Click Save to save your changes and return to your Nickname Address Book.
4. Click Cancel to return to your Nickname Address Book without any changes.

## Delete a nickname:

1. Click the Delete button adjacent the Nickname entry you wish to delete.

# Reports

In order to view keyword statistics and detailed message reports, you must login at the SMS DocLink user interface and click on the Reporting tab.

1. Open an Internet browser, and navigate to the URL given in your registration notification email. You may wish to bookmark the URL for future use.
2. Having logged in using your username and password, click on **SMS DocLink**, and then **Reporting**
3. Choose which report type you want by clicking on the appropriate link. You can generate keyword statistics, or a detailed message report that shows the results of each document request.
4. Select a single keyword or 'All Keywords', and specify the date range for the report.
5. Click on 'Go'.
6. Note that most reports can be exported to Excel for offline review by clicking on the 'generate report' link.

# Requesting Documents

SMS DocLink files are requested by sending a text message from a mobile phone to a specified service number.

## Request a document to be sent via email

1. Start a new SMS message
2. Type the keyword DOC followed by a space and the Keyword associated to the document you wish to request followed by a space and the email address of the recipient you wish to send the document.

See example below.



3. Send the SMS to the service number that you were given in your registration notification message.

Note: SMS DocLink remembers the last recipient address associated to the MSISDN. In the event of sending more than one document to the same recipient in succession, enter only the keyword DOC followed by a space and the Keyword associated to the new document. Leaving the recipient address out will automatically send the document to the recipient previously stated.

Example:

First SMS = DOC MAP joe@email.com  
Second SMS = DOC MAP

Both these messages will be sent to joe@email.com

## Request a document to be sent via fax

1. Start a new SMS message
2. Type the keyword DOC followed by a space and the Keyword associated to the document you wish to request followed by a space and the fax number of the recipient you wish to send the document.

See example below.



3. Send the SMS to the service number that you were given in your registration notification message.

Note: SMS DocLink remembers the last recipient address associated to the MSISDN. In the event of sending more than one document to the same recipient in succession, enter only the keyword DOC followed by a space and the Keyword associated to the new document. Leaving the recipient address out will automatically send the document to the recipient previously stated.

Example:

First SMS = DOC MAP 27211234567

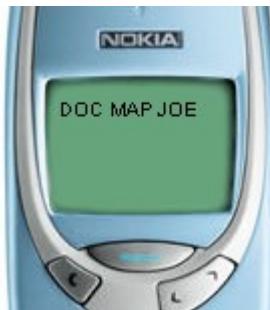
Second SMS = DOC MAP

Both these messages will be sent to 27211234567

#### **Request a document to be sent to a predefined contact in your Nickname Address Book**

1. Start a new SMS message
2. Type the keyword DOC followed by a space and the Keyword associated to the document you wish to request followed by a space and the predefined Nickname Keyword of the recipient you wish to send the document. To find out more about Nicknames, see Nickname Address Book.

See example below.



3. Send the SMS to the service number that you were given in your registration notification message.

Note: SMS DocLink remembers the last recipient address associated to the MSISDN. In the event of sending more than one document to the same recipient in succession, enter only the keyword DOC followed by a space and the Keyword associated to the new document. Leaving the recipient address out will automatically send the document to the recipient previously stated.

Example:

First SMS = DOC MAP JOE

Second SMS = DOC MAP

Both these messages will be sent to the address associated to the Nickname JOE

It is possible to configure the SMS DocLink service to use only the document keyword and recipient address using a short code. To find out more about this service, contact Grapevine Interactive. See Contact Us.

# Contact Us

***For more information:***

***Contact:***

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***For Support:***

***Contact:***

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